Release #13 Cycle 1 - Guide
Author: SIUC CWD
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# UAT Guide – Release #17, Cycle 1

Customer - Overview Page

## Contents

# Overview

User Acceptance Test (UAT) Release #17 cycle 1, has been deployed to the SIU UAT environment. Security constraints for this environment will require a login through the State Login Portal. When you follow the link to the UAT environment, the system will route the user to the State of Illinois Login.  After a successful login, the user will be returned to the UAT environment where IWDS-2.0 is running.

When the user is returned to the UAT environment, there will be NO security role permission constraints to access the application at this time.  Security permissions will be deployed later.

It is still important not to enter any personal identifiable information (PII).

## Purpose

The purpose of Release #17 cycle 1 is to review **the Customer Overview Page.** The UAT cycle will be open from **March 25th – April 2nd, 2026**.  This provides you with 6 working days to complete the review.  Your participation is appreciated.

# UAT Release #17 – Cycle 1 Expectations & Homework

## Homework Areas

For this week, UAT tasks will focus on the following key areas listed below:

- Navigating to the Overview Page
- Viewing the layout of the Overview Page
- Expanding and Collapsing the Overview Page
    - Intake
    - Career Plan
    - Outcomes
    - Transition
    - Follow-Up
    - Customer Settings
- Filtering by Status
- Add Action Item
- Update Status

## Due Date

Please complete your testing in these areas and submit your feedback by EOD on Thursday, April 2nd. This will give us an opportunity to address any issues prior to the next release.

## Access to UAT Environment

To access the UAT environment in your browser, follow the link provided here.
https://testapps.illinoisworknet.com/iwdst-Preview

## Reporting Issues

Please document any issues, bugs, or enhancement requests you identify in our shared notebook UAT 17 - Customer Overview Page The main purpose of using a shared notebook is for collaboration between members of the UAT team and Business Analysts. This will cut down on duplicate issues being reported.
When logging your entries:

- You should document this information as you are completing your UAT work.
- The first page of the notebook is labeled as Example Issue Reporting. Please refer to that page to get an idea of how you can report an issue.
- In the notebook, you will find a section labeled Release #17 – Cycle 1. The section is divided into several pages; each page is specific to the pages of the training plan. Ensure that each item is tracked under the correct category for the cycle and feature set you are providing feedback on.
- Be concise but detailed.
- If multiple issues arise in one area, log each one separately for clarity.
- Please add your name/initials to your entry.

- **If you have issues accessing the OneNote notebook-** Please contact one of the Business Analysts (BA) on the team. The business analysts are:
  - Laura Menke- laura.menke@siu.edu
  - Kelly Trimble- kelly.trimble@siu.edu
  - Andi Grabemeyer- andi.grabemyer@siu.edu
  - Al Menke- al.menke@siu.edu
  - Olivia Miller- olivia.miller@siu.edu
  - Lynette Tritz - lynette.tritz@siu.edu

## Expectations for UAT

As you test these areas, please keep in mind the following best practices:

- **Test Thoroughly**: Ensure that you navigate through all functions and features within these areas. Pay attention to any discrepancies between expected and actual results. Please explain your expected results and the actual results you found.

- **Detail-Oriented**: When reporting issues, provide as much context as possible, including:
    - Steps to reproduce the issue
    - Screenshots or recordings, if possible
    - Browser or device used during testing
    - Actual outcome vs. Expected outcome

- **Feedback Categories** – The SIU team will categorize your findings into three (3) possible classifications.
    - **Bugs**- When the system does not perform as expected, and the system is not performing according to the requirements, then a bug will be reported, tracked, fixed, and retested.
    - **Issues**- If the system is performing according to the requirements, but the user feels that the requirement was not captured correctly or now the user feels like the requirement is just not working as expected, then this is recorded as an issue. Issues are tracked and prioritized for change.
    - **Enhancements**- Once we are in UAT and the users recognize an area that could be improved, then this will be also logged as an issue and tagged as an enhancement.

## Best Practices for Effective UAT

- **Think like the end user**: Approach your testing from the perspective of someone unfamiliar with the system. This will help us identify usability issues and areas for improvement.

- **Be specific and thorough**: The more specific your feedback, the easier it will be to address. Include specific steps, expected outcomes, and actual results.

- **Provide context**: Always give context for your feedback. For instance, explain why an enhancement would improve the user experience or system performance.

By following these guidelines and providing detailed feedback, you're helping to ensure the final product meets user expectations and performs as intended.

# Step-by-Step Guide

The **Customer Overview Page** serves as a centralized dashboard for managing a customer's journey & settings. It features key sections including **Intake**, which captures initial client information, background details, and onboarding data; **Career Plan**, which outlines personalized goals, strategies, milestones, and development steps; **Outcomes**, which tracks achieved results, progress metrics, and success indicators; **Transition**, which manages the process of moving the customer from active program participation toward successful completion and exit from services; **Follow-Up**, which schedules and logs ongoing check-ins, support actions, and post-engagement monitoring; and **Customer Settings**, which allows Career Planner assignments, LWIA transfers, and pausing a customer from a 90-day exit. This comprehensive layout enables efficient oversight and tailored support throughout the customer lifecycle and provides the Career Planner with the ability to take action and set statuses on actions that are complete.

## Navigating to the Overview Page

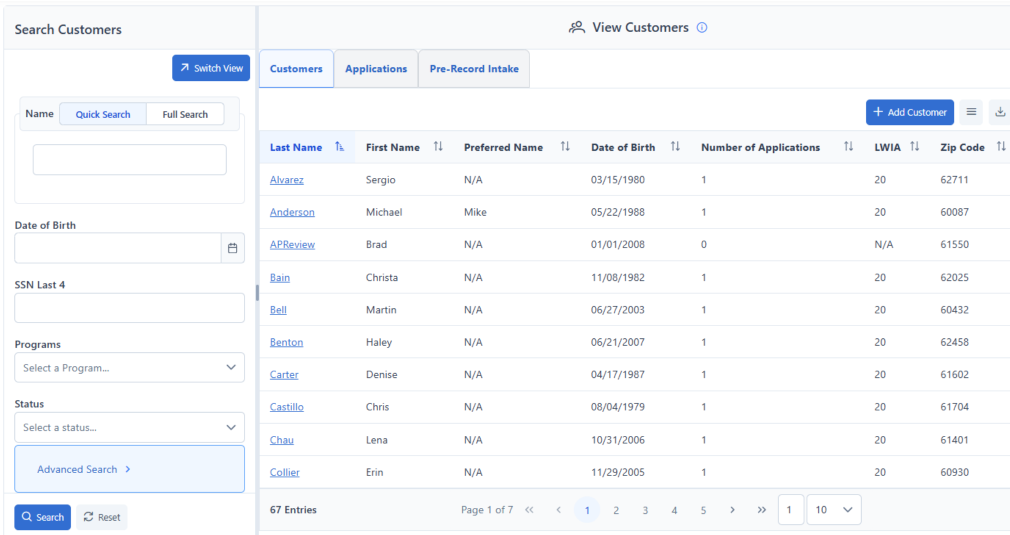
Before getting into the essential elements of working with the **Customer Overview Page**, we will discuss the steps necessary to access a customer, their active application, and navigate to the Overview Page.

***Note:*** *In the current system, we have not associated the user with a career planner role or LWIA. Because of this, you will see all customers on the customer landing page, and it will not default to a specific LWIA's or career planner's customer.*

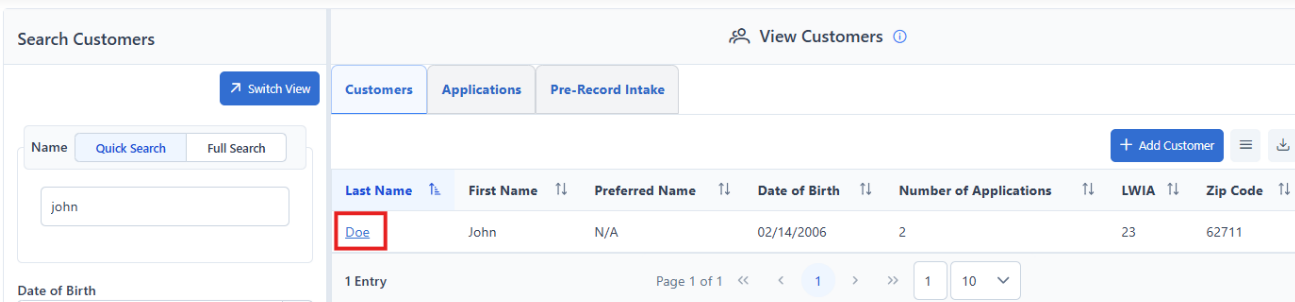
Select **Customers** from the main menu. This will navigate to the **Customers** management landing page.


The **Customers' landing page** is a two (2) panel page with a **Search Customers panel** on the left and a **View Customers panel** below.

***Note:*** *Since the customer landing page has been covered in multiple UAT sessions, it will not be covered here; we will go directly to selecting the customer.*

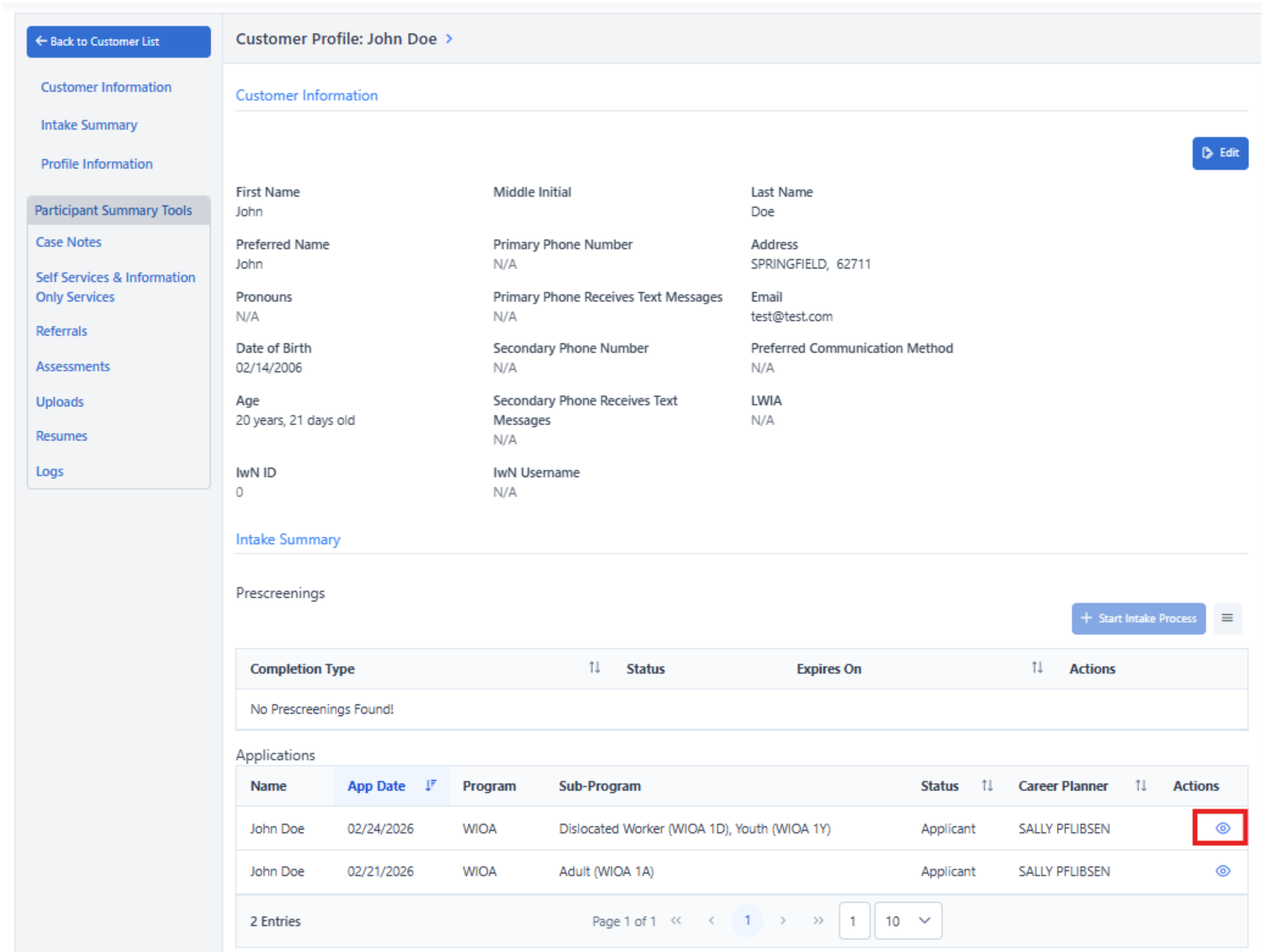



When you find the **Customer** with an **Application** in the list that you want to work with, select the **Name link**.




*Note: Each UAT user will be issued a customer persona, please find that customer in the list and select it.*

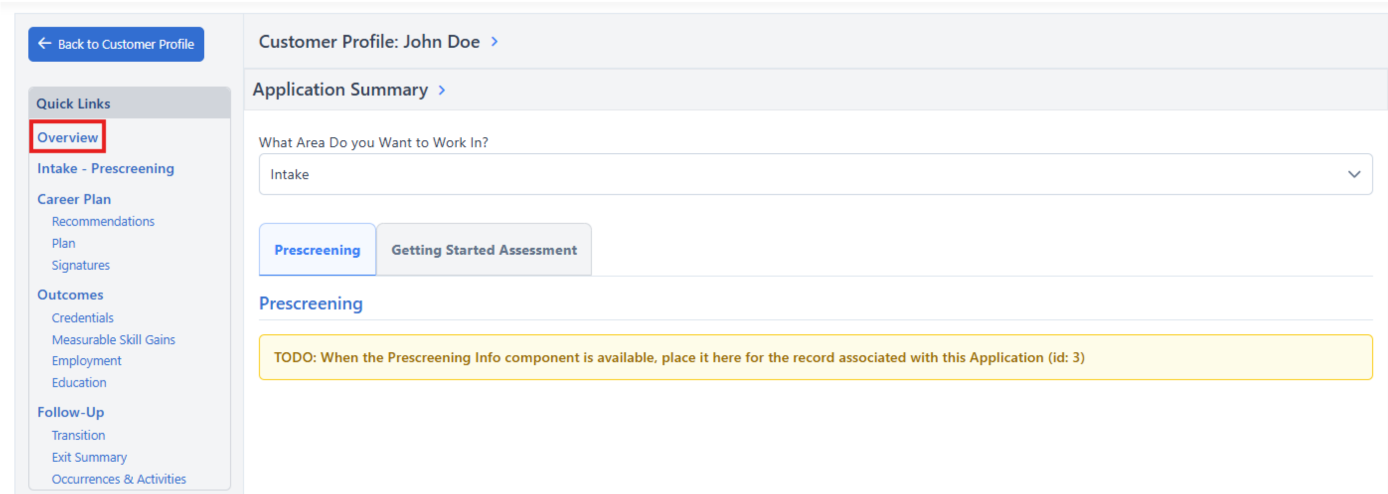
After selecting the **Customer Link**, the **Customer Profile** page will open. Find the **Applications** section in the middle of the page to see the active application in a grid. The **Actions View Icon** is located at the far right of the row.



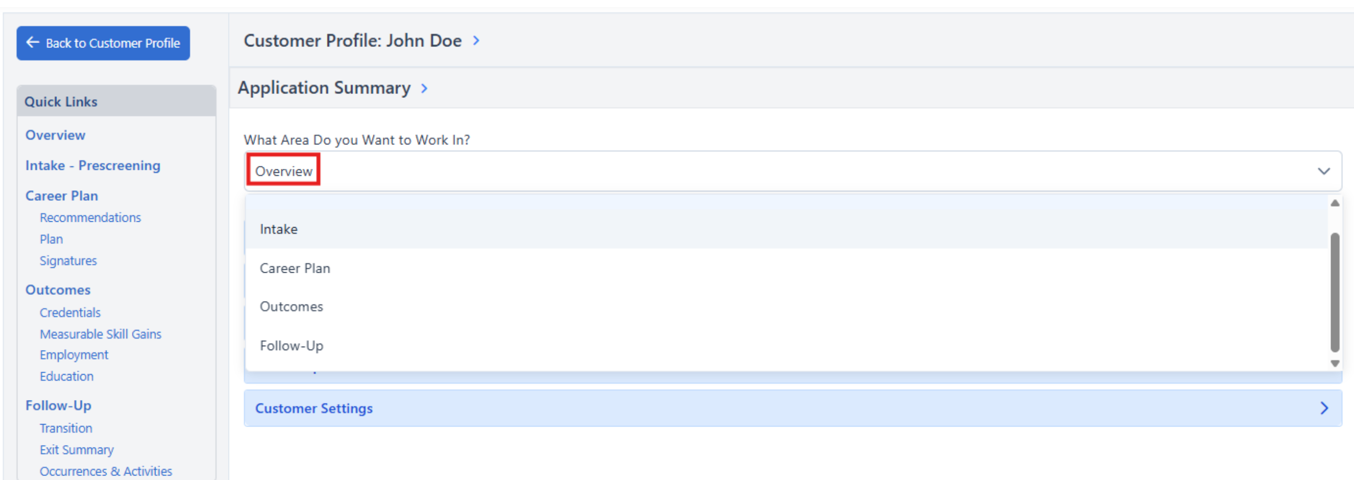

When selecting the **Actions View Icon**, it moves the user to the **"What Area Do You Want to Work In?"**.

You can access the Customer **Overview** section in two <u>(2) simple ways</u>:

1. **Using the Quick Links (Left Navigation Panel)** In the left sidebar, locate the **Quick Links** section. Click the **Overview** link to go directly to the **Overview** landing page.



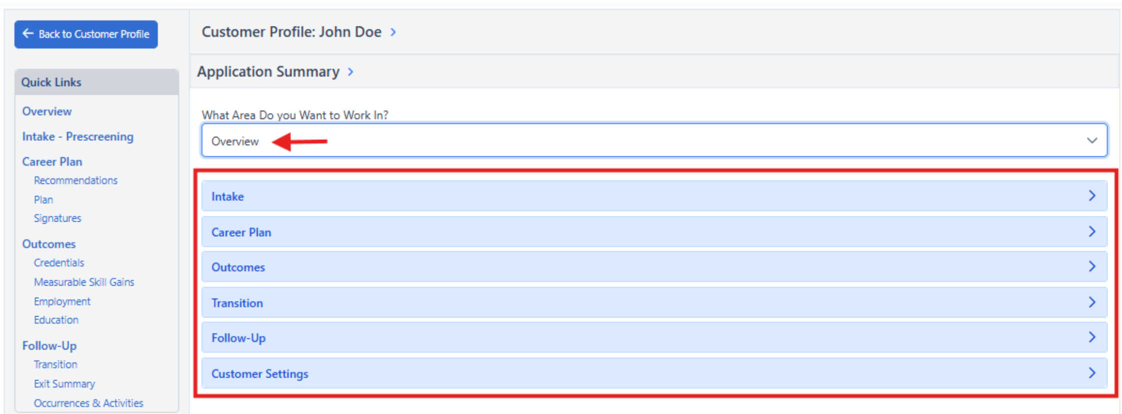

2. **Using the Area Selection Dropdown** At the top of the screen (or in the main header area), find the dropdown labeled **"What Area Do You Want to Work In?"** Click the dropdown and select Overview.




Either method will take you straight to the **Customer Overview** landing page section, where you can expand/collapse details, view action items, apply filters, and manage customer participation settings.

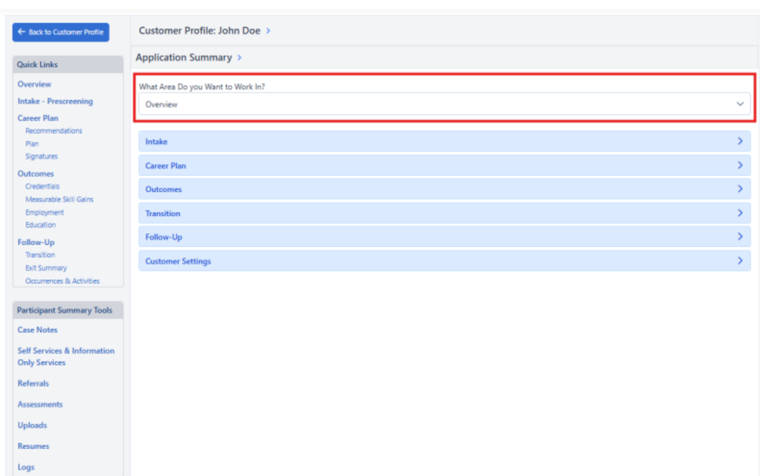
Once you're in the **Overview** area, the currently selected option in the dropdown will reflect "Overview" to confirm your location. Selecting the **Overview** area reveals *six collapsible sections* in the following sequence: **Intake → Career Plan → Outcomes → Transition →Follow-Up → Customer Settings.**

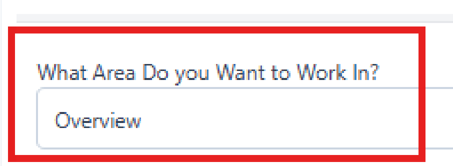
- **The Overview Page is divided into the Lifecycle of the Customer's Participation in our Programs**.
  - *Each expansion has divided up information from the System with preloaded Actions*
  - *We are currently adding the ability for System Triggers to add additional Actions*




## Viewing the layout of the Overview Page

The **View Overview Page** provides a centralized, at-a-glance summary of a customer's journey in the system. When you select the Overview area, the page displays six collapsible sections arranged in logical sequence: Intake → Career Plan → Outcomes → Transition → Follow-Up → Customer Settings. *By default*, all sections are loaded in a *collapsed state* to keep the interface clean and focused, allowing users to expand only the specific areas they need to review or edit at that time. This accordion-style layout helps streamline navigation while maintaining a clear, chronological view of the customer's progress and configuration.



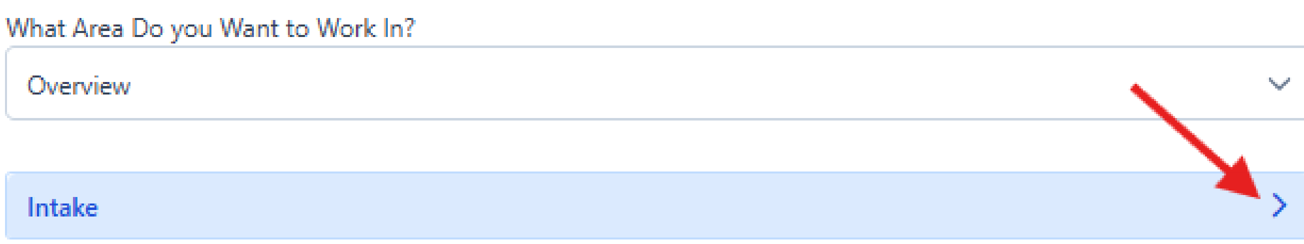



# Expanding and Collapsing the Overview Page

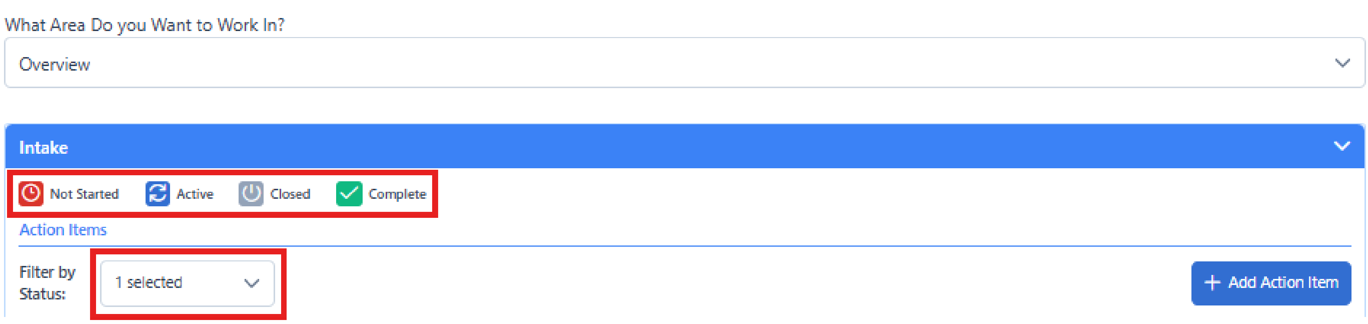
On the **View** Overview Page, each of the six collapsible sections (Intake → Career Plan → Outcomes → Transition → Follow-Up → Customer Settings) includes a chevron icon ( when collapsed,  when expanded) to the right of its header. **Clicking the chevron**—or anywhere on the header—toggles that individual section open or closed. All sections operate independently, so you can expand any combination (or all of them) at once without affecting the others. This gives you quick, on-demand access to the details while keeping the default view clean and collapsed.

## Expanding and Collapsing the Overview Page – **Intake**

- When the **Intake Overview** section is expanded, the expansion bar turns darker to indicate it is open.
- Directly below the bar, an **icon legend** appears to explain the status icons for all activities.
- Beneath the icon legend, the **Action Items Grid** is displayed.
- The multi-select dropdown filter above the grid defaults to **Not Started** for the Action rows. You can select any combination of status filters to customize the view. (Collapsing the section returns the bar to its original lighter appearance and hides the legend and grid.)
- To the right of the Status filter is the [+Add Action Item] button




*The above Chevron collapsed*

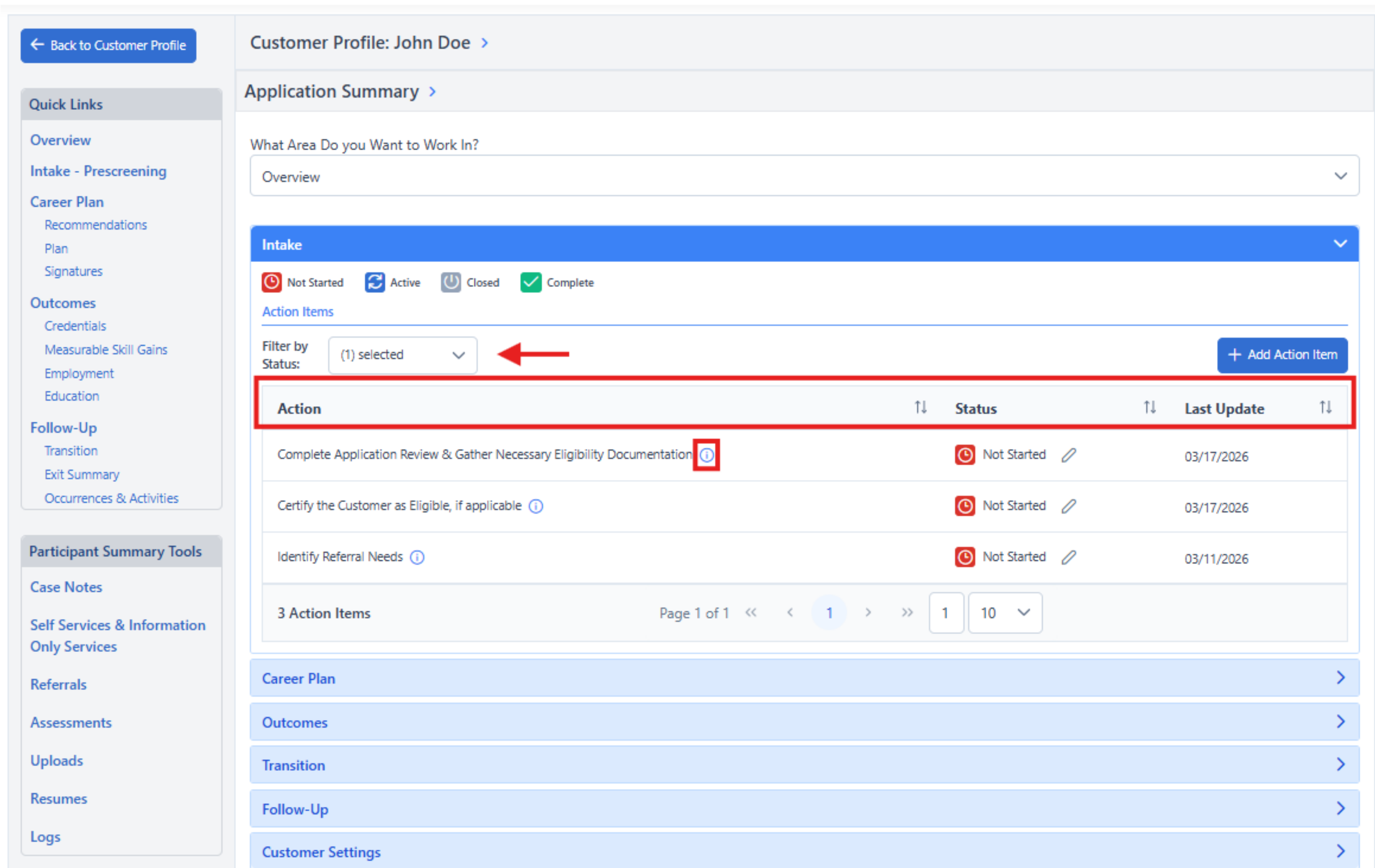



*The above Chevron expanded*

Below the **Filter by Status** dropdown and the **Action Items Grid** displays the following column headers (from left to right):

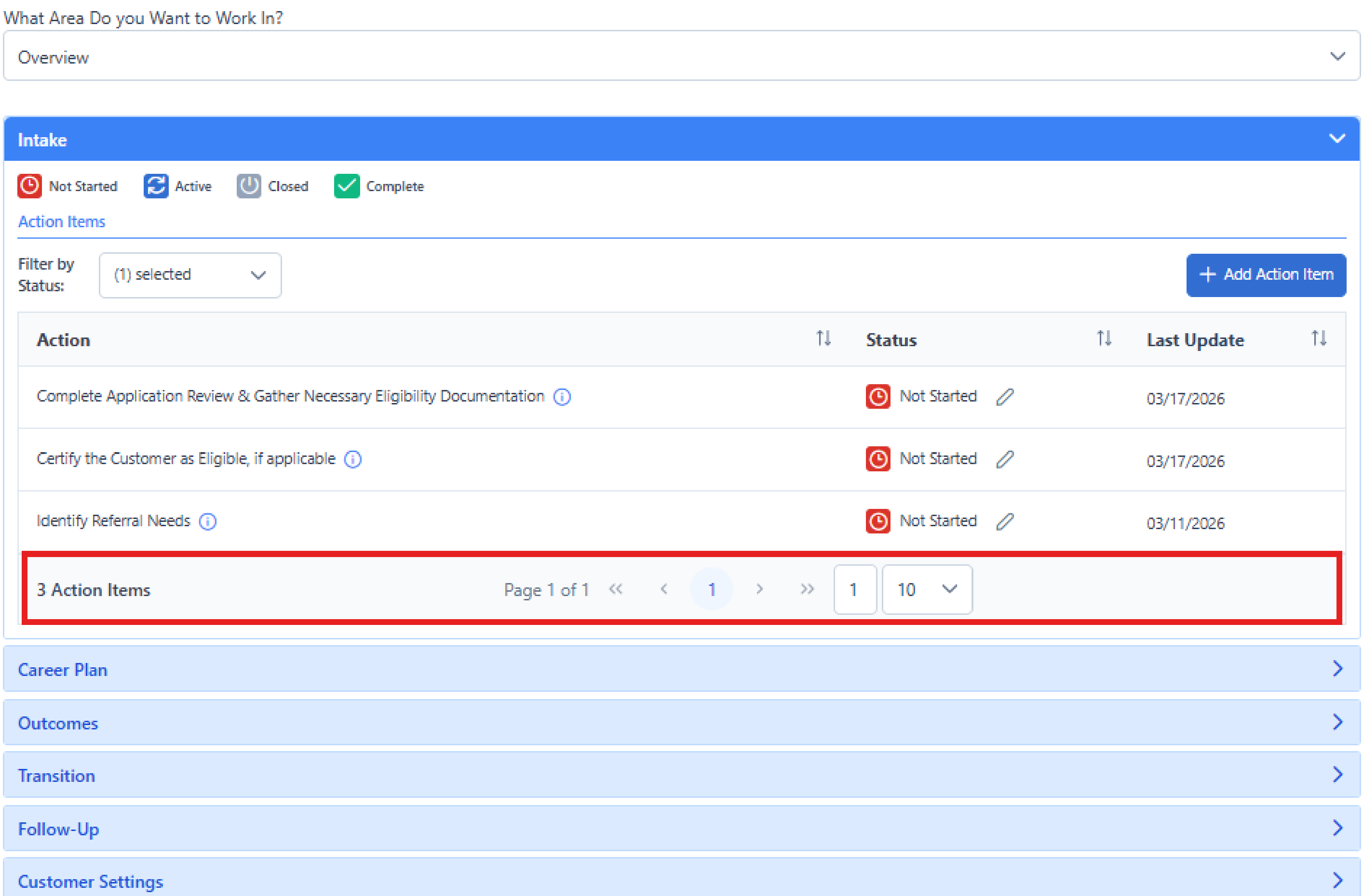
- **Action** – The name of each action item. Click the sort icon to sort the list alphabetically in ascending or descending order.
- **Status** – Shows the current status of the action, along with its corresponding icon. Click the sort icon to reorder the grid by status.
- **Last Updated** – Displays the date/time of the most recent update. Click the sort icon to sort chronologically (newest to oldest or oldest to newest).

Each row in the grid represents one action item. To the right of the action name, you'll see an **information bubble icon** ( ). Clicking or selecting this icon opens a modal displaying the full **description** of that action.




- **Pagination** (at the bottom of the grid)- When there are more action items than can fit on a single page, pagination controls appear at the bottom of the Action Items Grid. These typically include:
    - Page numbers (e.g., 1 2 3 … 10) – Click a number to jump to that page.

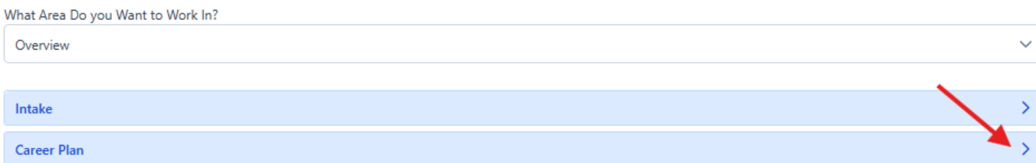
- Previous (<) and Next (>) buttons – Move one page backward or forward.
- A display showing the current range of items (e.g., "Showing 1–25 of 87 items") and sometimes a rows-per-page selector (e.g., 25 | 50 | 100).

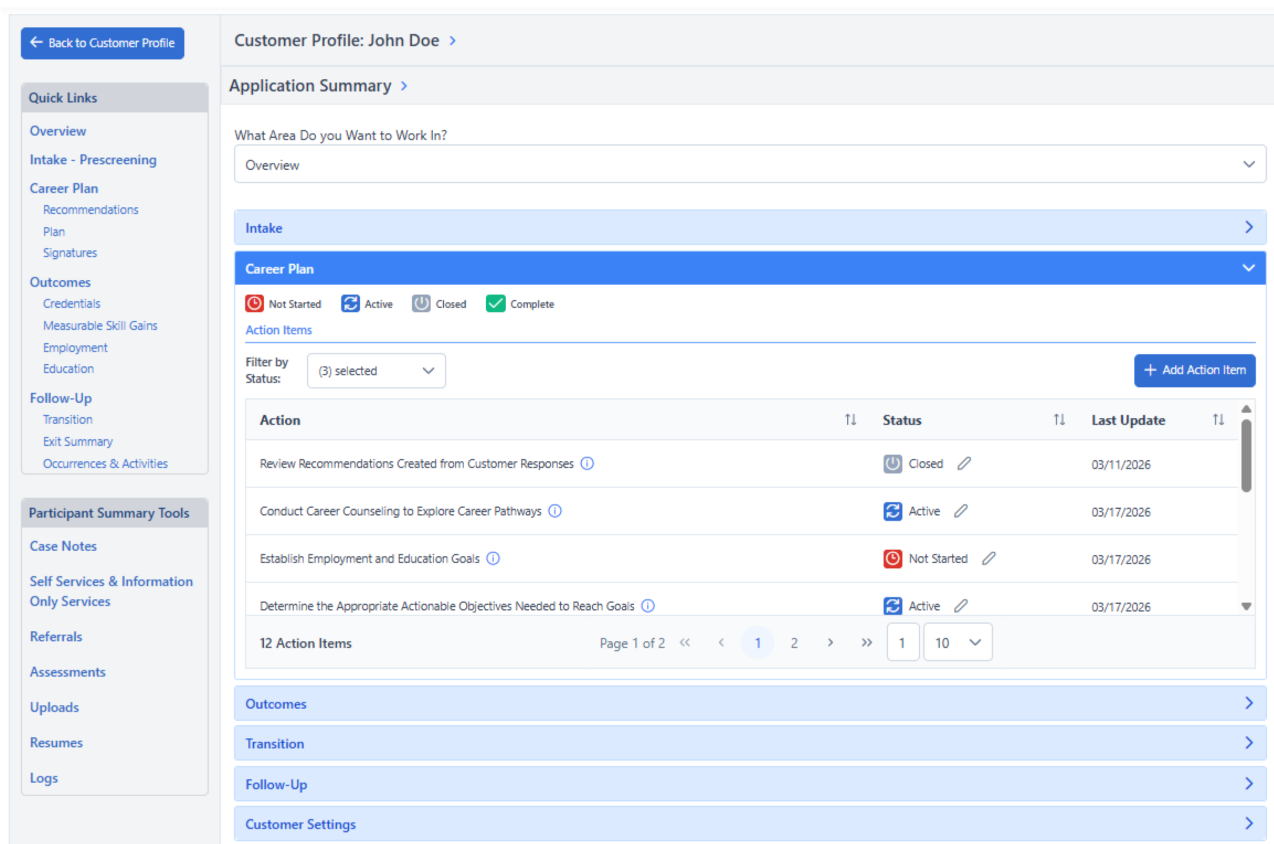



## Expanding and Collapsing the Overview Page – **Career Plan**

- When the **Career Plan Overview** section is expanded, the expansion bar turns darker to indicate it is open.
- Directly below the bar, an **icon legend** appears to explain the Status Icons for all activities.

- Beneath the icon legend, the **Action Items Grid** is displayed.
- The multi-select dropdown filter above the grid defaults to **Not Started** for the Action rows. You can select any combination of status filters to customize the view. (Collapsing the section returns the bar to its original lighter appearance and hides the legend and grid.)
- To the right of the Status Filter is the [**+ Add Action Item**] button
- Below the **Filter by Status** dropdown, the Action Items Grid displays the following column headers (from left to right): **Action**, **Status**, **Last Update** (*all with sort icons*)
- **Pagination** (at the bottom of the grid)

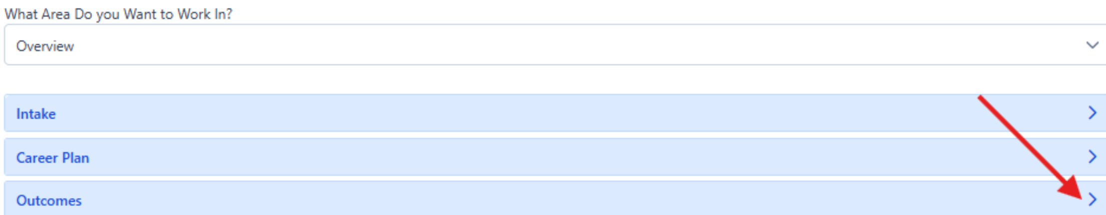


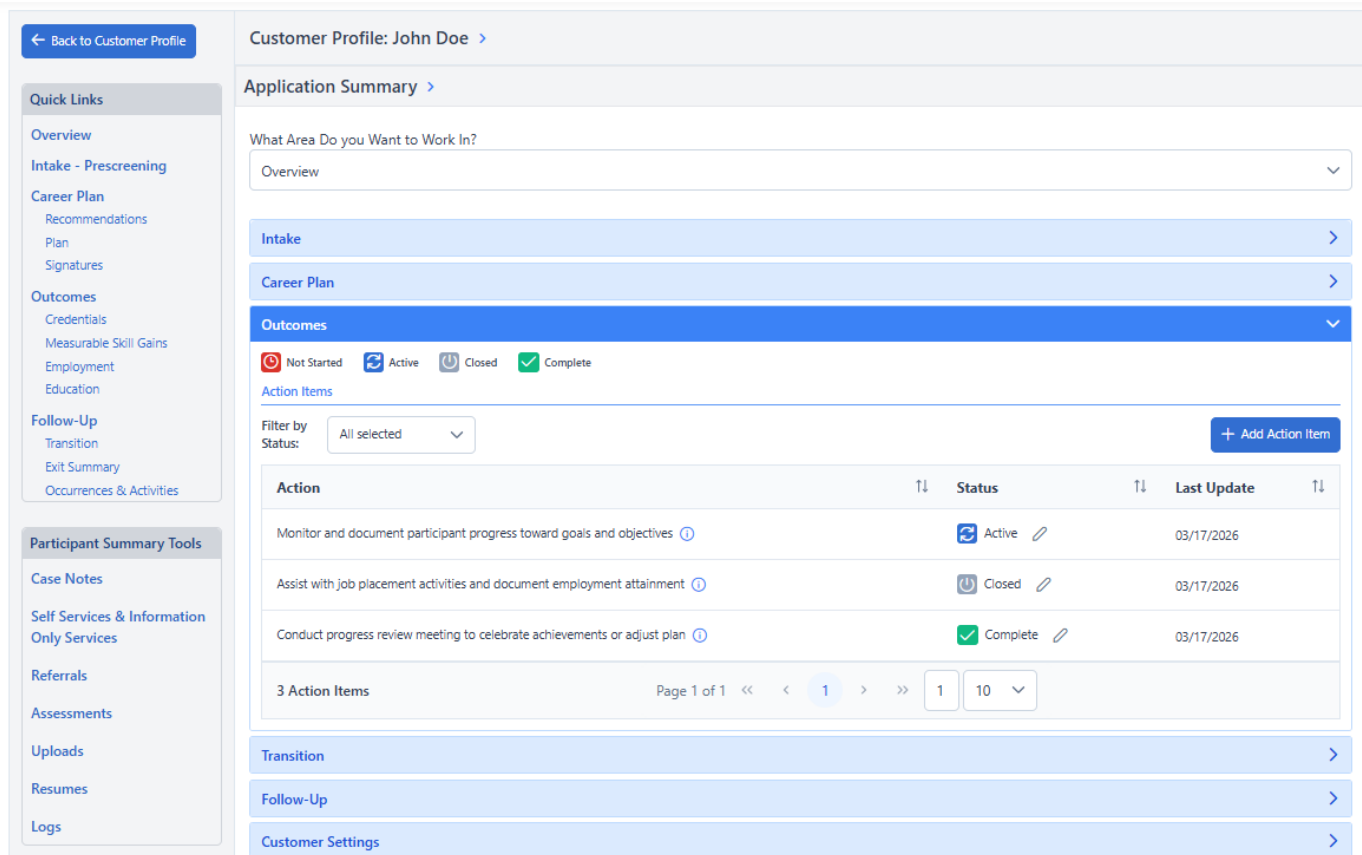




## Expanding and Collapsing the Overview Page – **Outcomes**

- When the **Outcomes Overview** section is expanded, the expansion bar turns darker to indicate it is open.
- Directly below the bar, an **icon legend** appears to explain the status icons for all activities.
- Beneath the icon legend, the **Action Items Grid** is displayed.

- The multi-select dropdown filter above the grid defaults to **Not Started** for the Action rows. You can select any combination of status filters to customize the view. (Collapsing the section returns the bar to its original lighter appearance and hides the legend and grid.)
- To the right of the Status Filter is the [**+ Add Action Item**] button
- Below the **Filter by Status** dropdown, the Action Items Grid displays the following column headers (from left to right): **Action**, **Status**, **Last Update** (*all with sort icons*)
- **Pagination** (at the bottom of the grid)

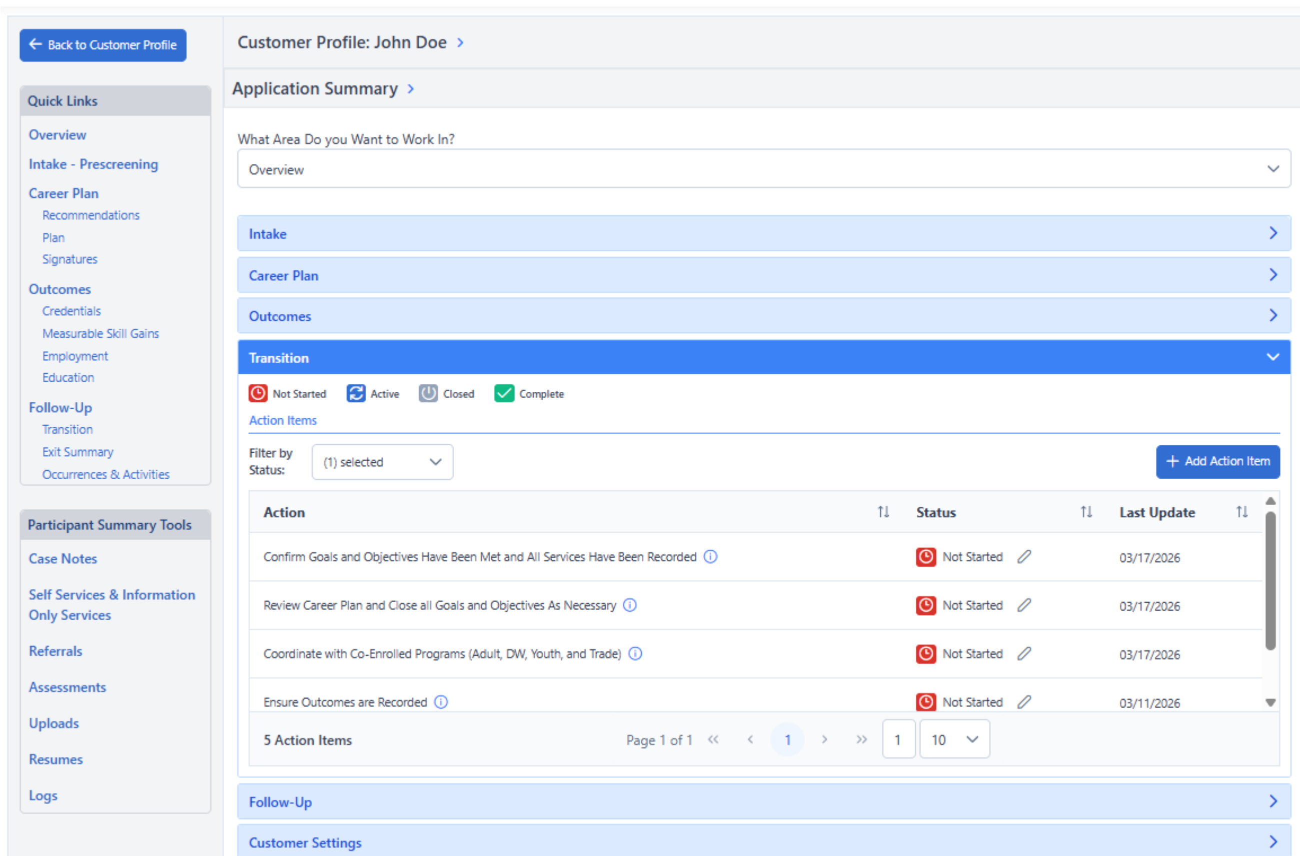



## Expanding and Collapsing the Overview Page – **Transition**

- When the **Transition Overview** section is expanded, the expansion bar turns darker to indicate it is open.
- Directly below the bar, an **icon legend** appears to explain the status icons for all activities.
- Beneath the icon legend, the **Action Items Grid** is displayed.

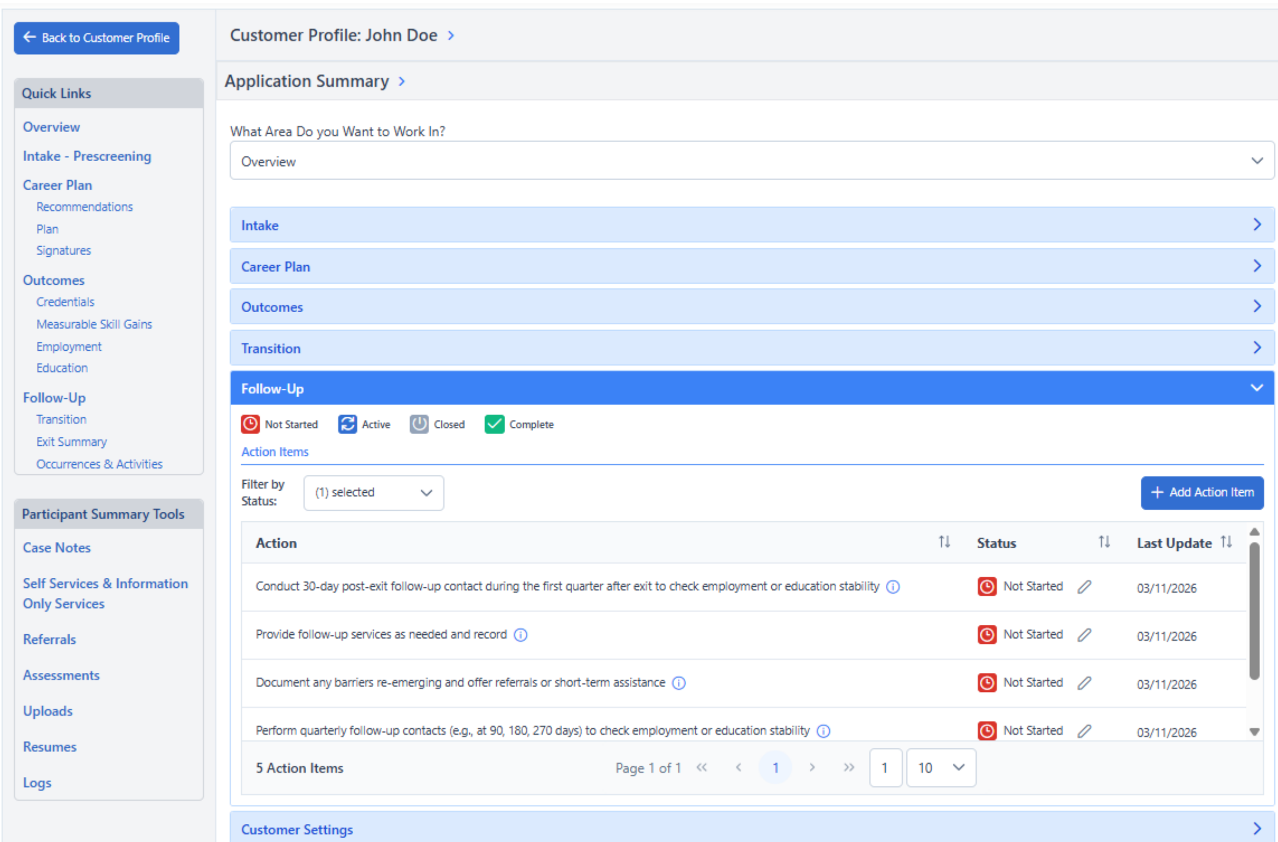
- The multi-select dropdown filter above the grid defaults to **Not Started** for the Action rows. You can select any combination of status filters to customize the view. (Collapsing the section returns the bar to its original lighter appearance and hides the legend and grid.)
- To the right of the Status Filter is the [**+ Add Action Item**] button
- Below the **Filter by Status** dropdown, the Action Items Grid displays the following column headers (from left to right): **Action**, **Status**, **Last Update** (*all with sort icons*)
- **Pagination** (at the bottom of the grid)


## Expanding and Collapsing the Overview Page – **Follow-Up**

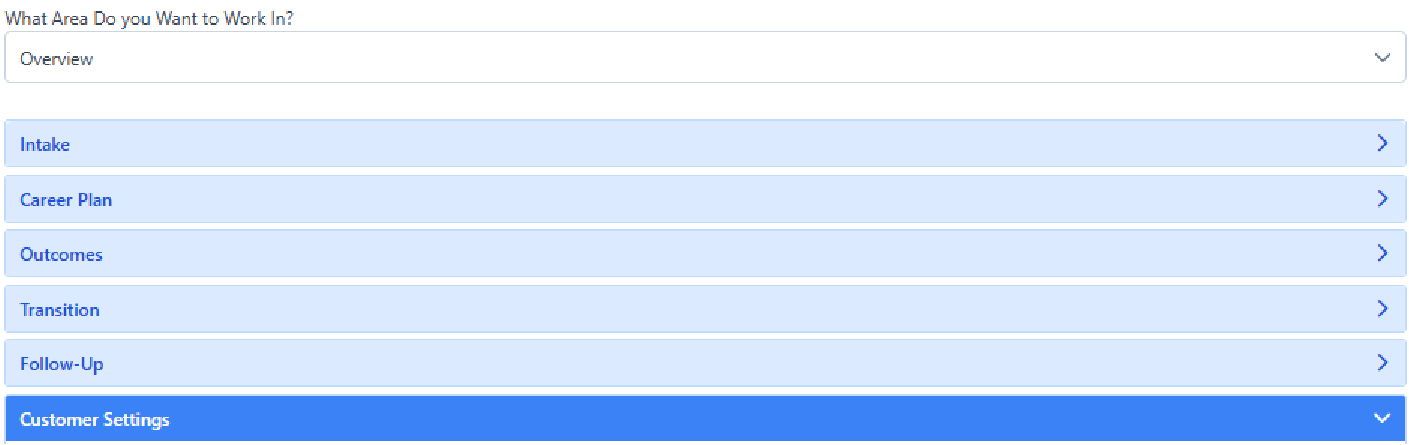
- When the **Follow-Up Overview** section is expanded, the expansion bar turns darker to indicate it is open.
- Directly below the bar, an **icon legend** appears to explain the status icons for all activities.
- Beneath the icon legend, the **Action Items Grid** is displayed.

- The multi-select dropdown filter above the grid defaults to **Not Started** for the Action rows. You can select any combination of status filters to customize the view. (Collapsing the section returns the bar to its original lighter appearance and hides the legend and grid.)
- To the right of the Status Filter is the [**+ Add Action Item**] button
- Below the **Filter by Status** dropdown, the Action Items Grid displays the following column headers (from left to right): **Action**, **Status**, **Last Update** (*all with sort icons*)
- **Pagination** (at the bottom of the grid)


## Expanding and Collapsing the Overview Page – **Customer Settings**

When the **Customer Settings Overview** section is expanded, the expansion bar turns darker to indicate it is open.

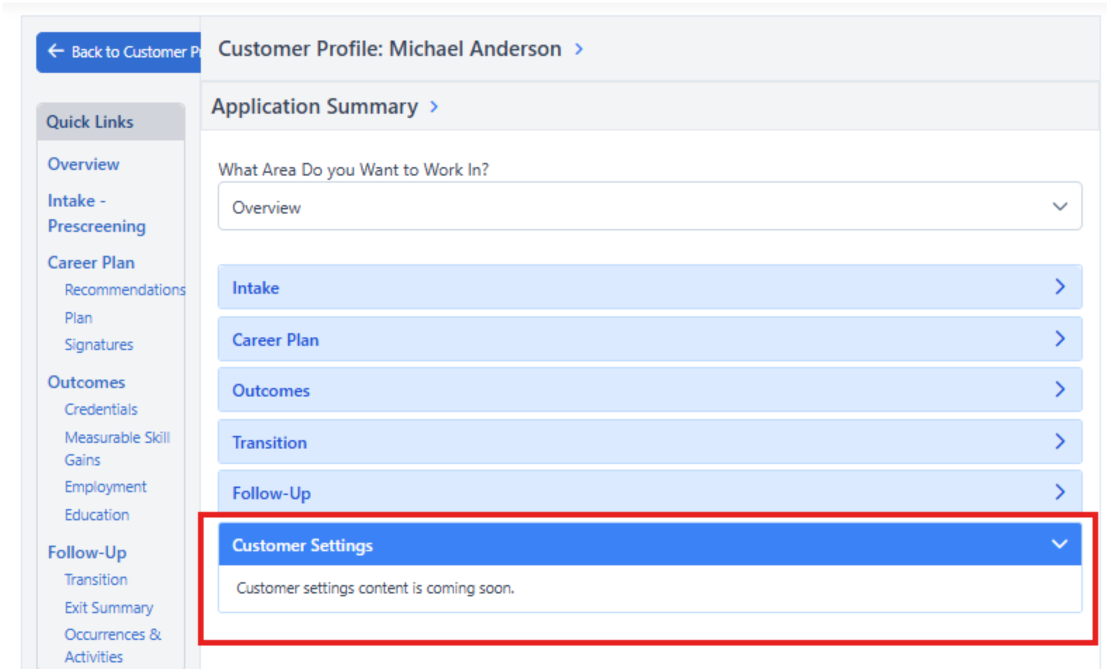



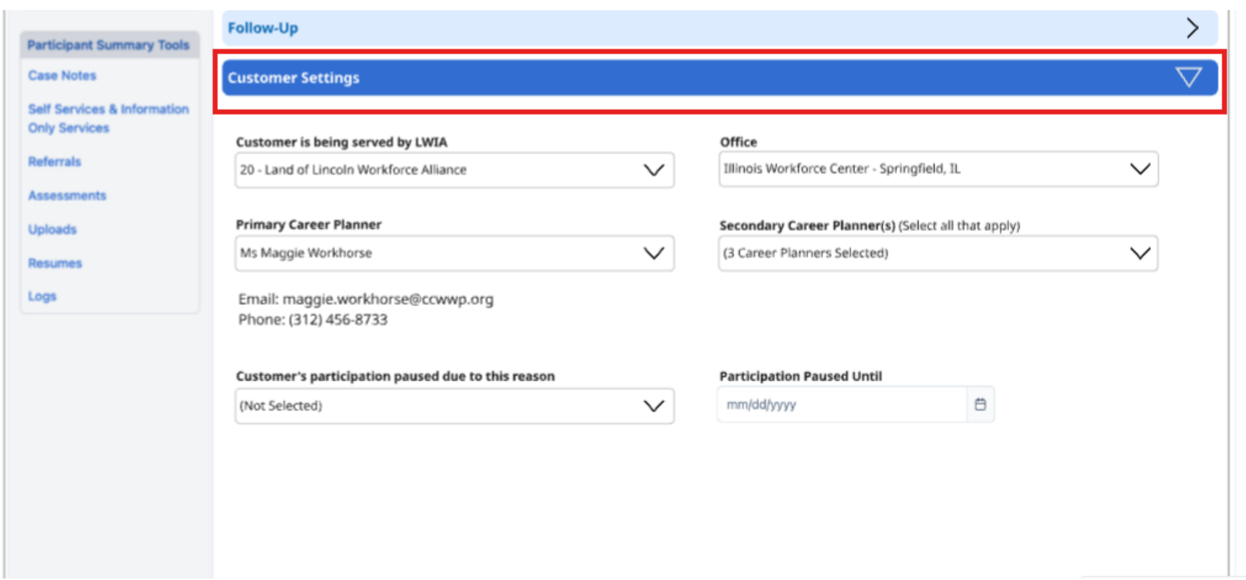

The **Customer Settings** section provides tools to manage a customer's current participation and activity within the system. It includes the following key options:

- **Program Access and Configuration**
  - **LWIA** (Local Workforce Innovation Area) – Settings specific to the customer's assigned workforce region.
  - **Office** – Assign or update the primary service office/location.
  - **Primary Career Planner** – Assign, change, or view the assigned career planner/case manager. Along with the email and phone of the planner.
  - **Secondary Career Planner(s)** – The career planner can select one or more secondary career planners as support planners for the customer.
- **Pause Participation and Participation Paused Until**

  A dedicated option to temporarily pause the customer's active participation in the program. When paused:
  - Use the dropdown filter selection to indicate the reason why paused.
  - By pausing a customer, they will not automatically be exited from the program due to no services in 90 days.
  - The Participation Paused Until date is the date the career planner expects the customer to be actively participating in the program once again.

Use the **Customer Settings** section to quickly adjust a customer's enrollment status, reassign career planner(s) or locations, or temporarily halt participation when needed (e.g., during extended leave, relocation, or other life events). All changes are logged with timestamps for audit purposes. *(Customer Settings are coming soon)*.



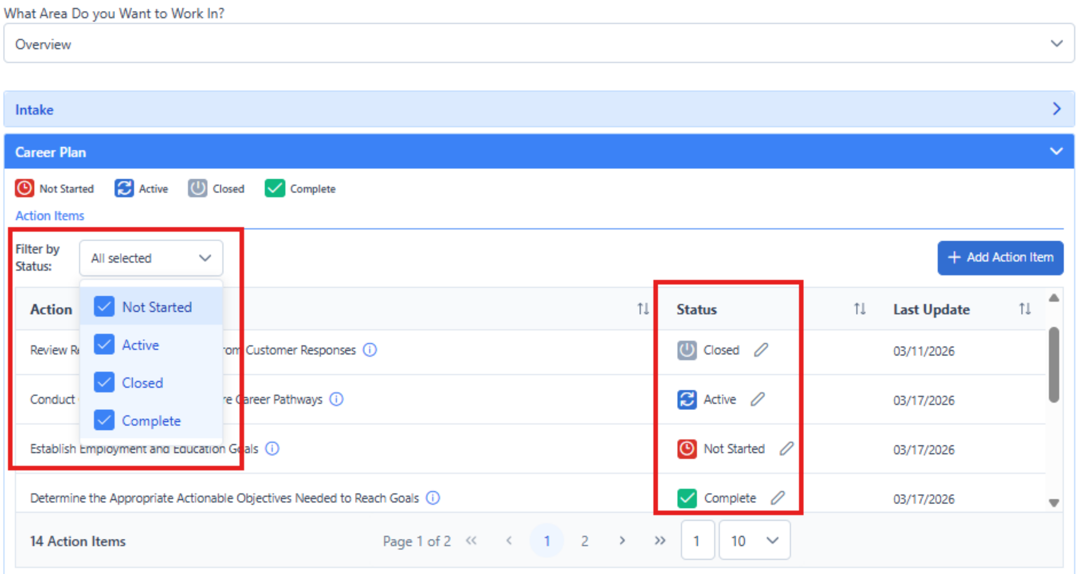

## Filtering by Status

In the **Career Overview**, the **Filter by Status** option lets you narrow down the action items displayed by their status. You can select:

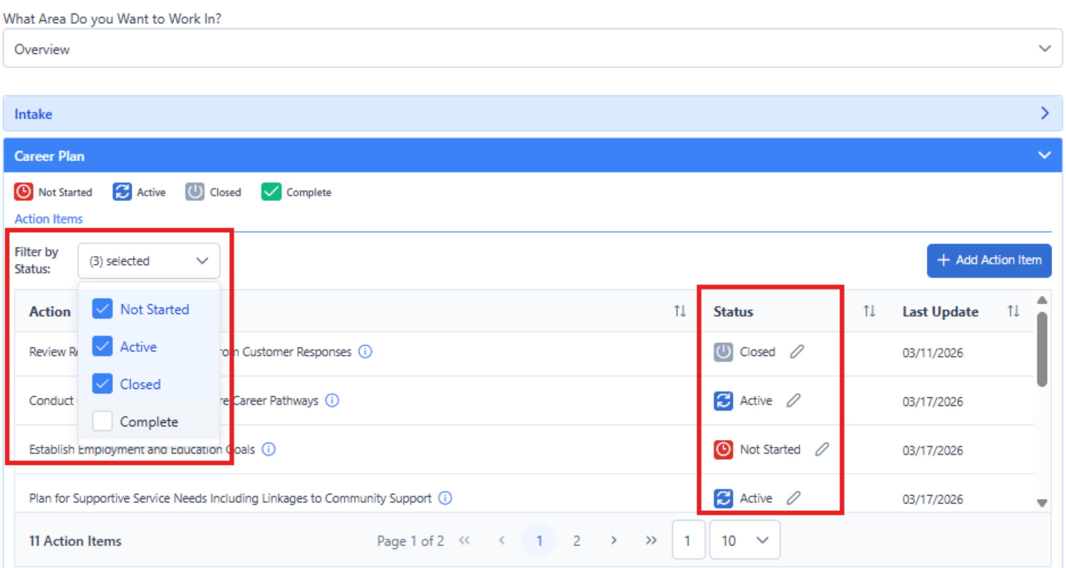
- **All** to view every action item regardless of status (Closed, Active, Not Started, or Complete), or

- Choose specific statuses—such as **(3) selected** (three statuses), **(2) selected** (two statuses), or **(1) selected** (one status) to focus only on action items matching your chosen combination.

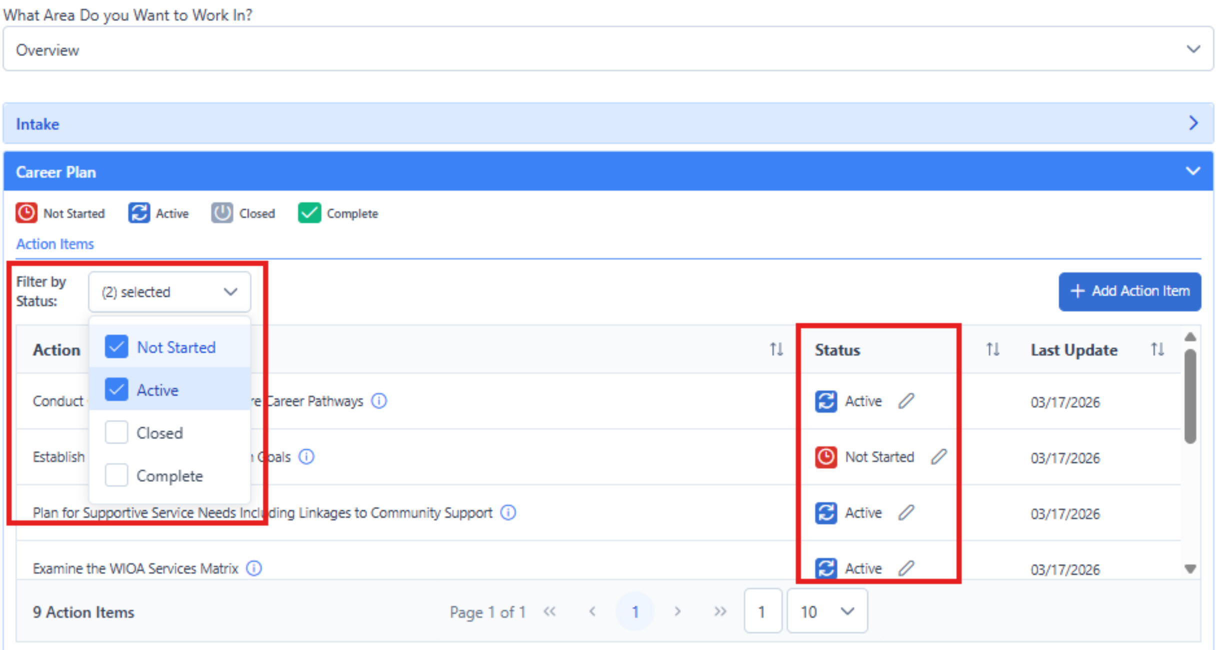
*The image below is* ***Filtered by Status as*** *- "All Selected"*




*The image below is* ***Filtered by Status as*** *- "(3) Selected"*




*The image below is* **Filtered by Status as** *- "(2) Selected"*

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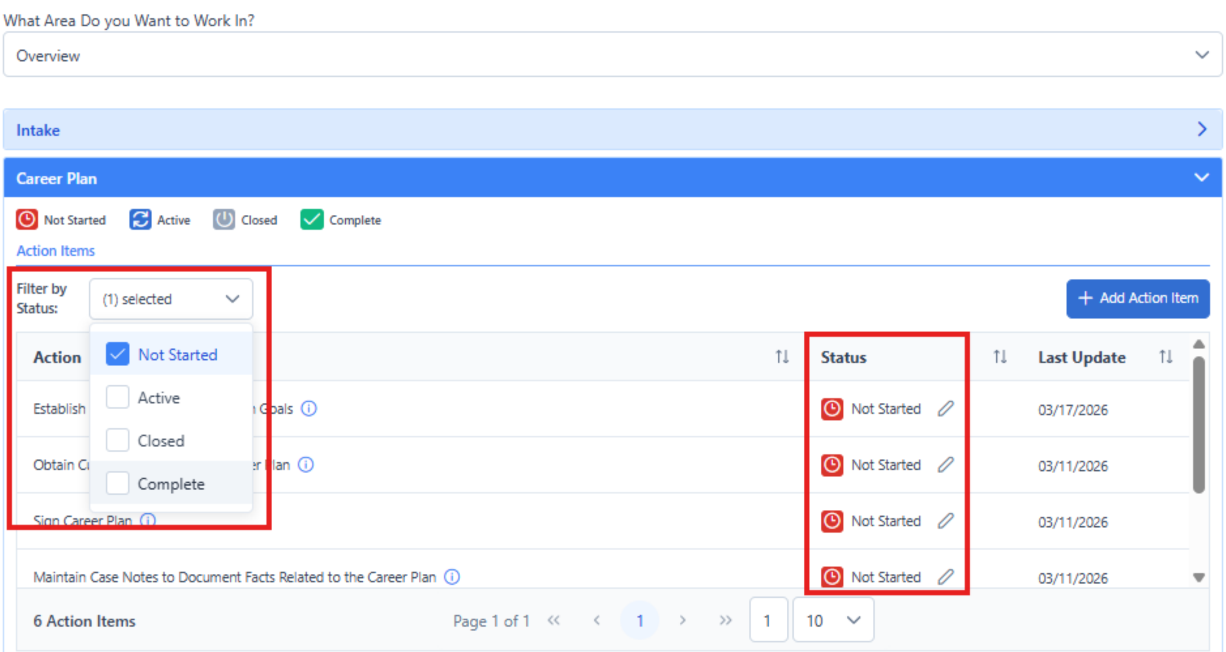
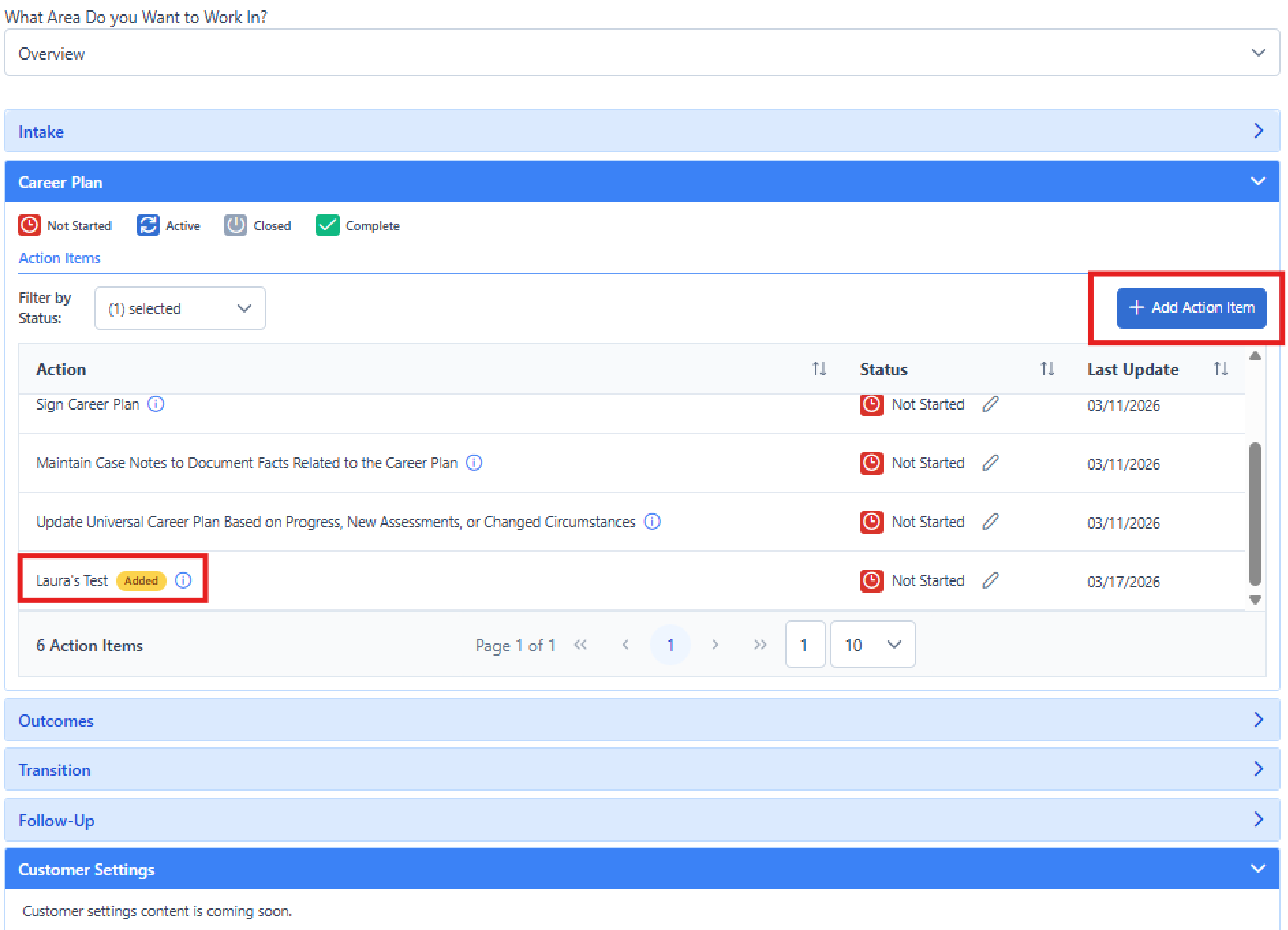
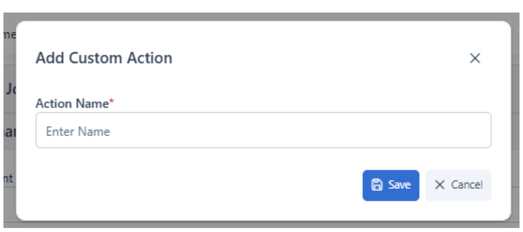



## Add Action Item

Use the [**+ Add Action Item**] button in the Career Overview when a necessary action isn't available in the predefined list of options. Simply click the button to open a modal where you can manually type in the desired action name, then save it to add the custom item.




Once added, the new action will appear in the action grid with a distinctive yellow pill labeled "**Added**" next to the action name in its row, clearly indicating it's a user-created item. This feature gives you flexibility to track personalized development steps or unique tasks tailored to the customer life cycle.




## Update Status

In the **Career Overview**, the Career Planner can update the status of any customer action item at any time to reflect progress.

To do so, simply click the **edit icon** next to the action item, select one of the four available statuses - **Not Started**, **Active**, **Closed**, or **Complete.**

- To confirm and save the new status, click the green circle with the checkmark.
- If the Career Planner decides not to make any changes, they can simply click the red circle with the X to cancel and close the edit mode without saving.

Once saved, the status will update immediately in the action grid, and the Last Update date will be recorded to reflect the change. This ensures the customer's career plan stays accurate and reflects the most current progress.